



Virginia Healthcare Workforce Briefs

Indicators from the Bureau of Labor Statistics'
Current Employment Statistics Survey
Series 2: Regional & Sectoral Employment

Series 2, Issue 29

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Data in this report is not seasonally adjusted. HC&SA data includes employees of private firms only. Self-employed persons, including health professionals in private practice, are not included.

Highlights

- ◆ Data in this series is not seasonally adjusted and exhibits short-term volatility from fluctuations in holidays, weekends, weather and other seasonal factors. Estimates for the most recent month are preliminary.
- ◆ The Rest of Virginia had the strongest month in terms of regional HC&SA employment growth, adding 1,000 jobs during the month. Northern Virginia also had a strong month, adding 800 jobs in May. Only Hampton Roads failed to participate in the employment gains of May; its HC&SA sector lost 200 jobs during the month.
- ◆ Most of the HC&SA employment gains experienced in May were concentrated in the Social Assistance subsector, which added 1,700 jobs during the month. Hospitals were the only other HC&SA subsector to add jobs in May, although its gains were erased by the combined losses of Ambulatory Services and Residential Care Facilities.
- ◆ So far in 2014, all employment growth in Virginia's HC&SA sector has occurred in Richmond, where 3,200 jobs have been created. With respect to HC&SA subsectors, Social Assistance has been the main driver of year-to-date employment growth in Virginia, although Ambulatory Services have also made a small, positive contribution.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	May 2013	Feb. 2014	Apr. 2014	May 2014	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,776.0	3,717.4	3,770.4	3,785.5	0.3%	7.5%	4.9%
Health Care & Social Assistance	409.4	411.4	413.0	414.7	1.3%	3.2%	5.1%
Virginia Beach, Norfolk, Newport News							
Total Nonfarm	755.9	737.2	749.2	754.2	-0.2%	9.5%	8.3%
Health Care & Social Assistance	86.8	89.0	89.1	88.9	2.4%	-0.4%	-2.7%
Northern Virginia							
Total Nonfarm	1,371.5	1,351.6	1,369.0	1,373.8	0.2%	6.7%	4.3%
Health Care & Social Assistance	114.2	113.8	113.7	114.5	0.3%	2.5%	8.8%
Richmond							
Total Nonfarm	633.6	633.7	643.1	645.6	1.9%	7.7%	4.8%
Health Care & Social Assistance	80.2	81.6	83.7	83.8	4.5%	11.2%	1.4%
Rest of Virginia							
Total Nonfarm	1,015.0	994.9	1,009.1	1,011.9	-0.3%	7.0%	3.4%
Health Care & Social Assistance	128.2	127.0	126.5	127.5	-0.5%	1.6%	9.9%

Preliminary estimates are italicized

*Seasonally adjusted data is adjusted by the Bureau of Labor Statistics to account for weather and other seasonal changes. Since the US Bureau of Labor Statistics does not provide seasonally adjusted data at this level, this series uses non-seasonally adjusted data exclusively. Seasonal variation may account for some of the variation in time series data. When comparing data in this series to other HWDC series or other publications it is important to note whether the data reported has been seasonally adjusted.

Regional HC&SA Employment Growth, Level

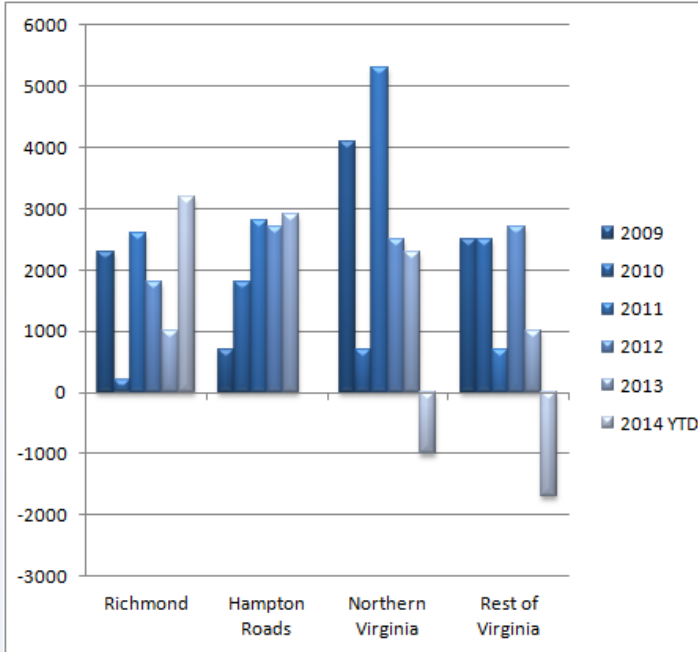


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Change from Dec to Dec).

According to preliminary data released on June 20, 2014 by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's HC&SA sector gained 1,700 jobs in May. Meanwhile, April's preliminary estimate for HC&SA employment was revised upward by 200 jobs. With this revision, Virginia's HC&SA sector lost 800 jobs in April.

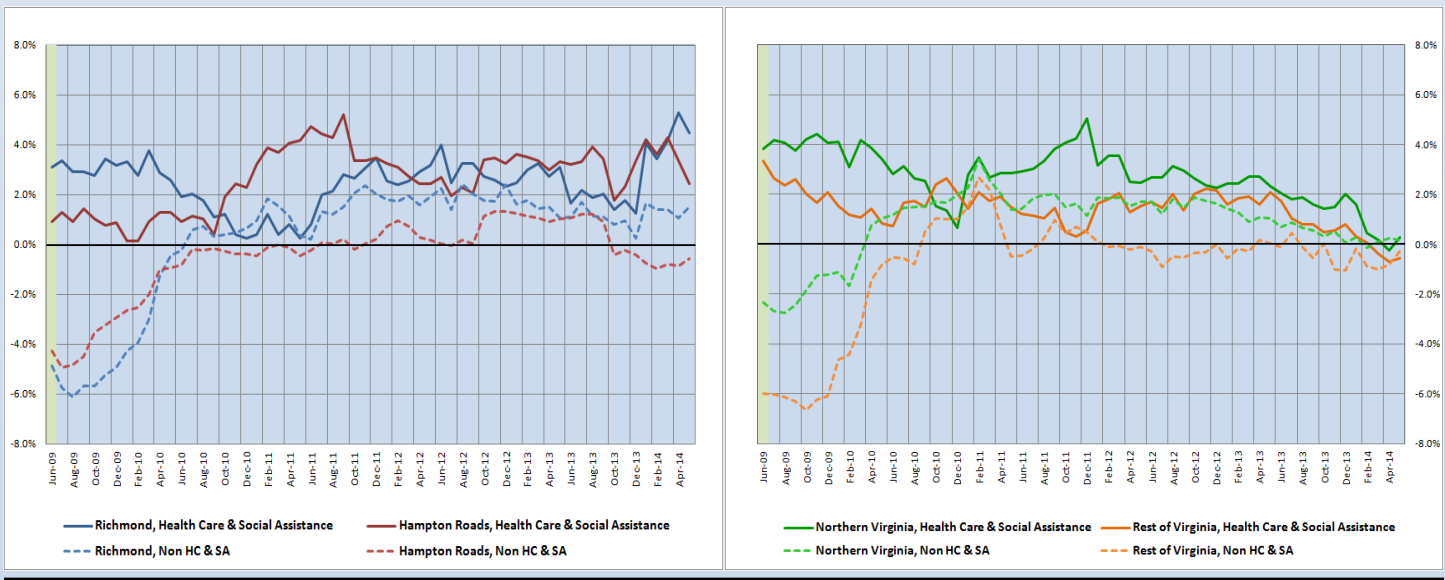
Thanks to May's strong results, Virginia's HC&SA sector is once again experiencing year-to-date employment gains. However, these gains add up to a rather modest 500 total jobs, which represents an average gain of just 100 new HC&SA jobs per month across the state. At the same point in 2013, Virginia's HC&SA sector had added 2,400 jobs to the state's economy.

Furthermore, all of these job gains are coming from just one region of Virginia: Richmond. So far in 2014, Richmond has seen HC&SA employment increase by 3,200 jobs. In just five months, employment gains in Richmond's HC&SA sector have already exceeded the 2,800 jobs that were added in the region over the previous two years combined.

Year-Over-Year Regional Employment Growth

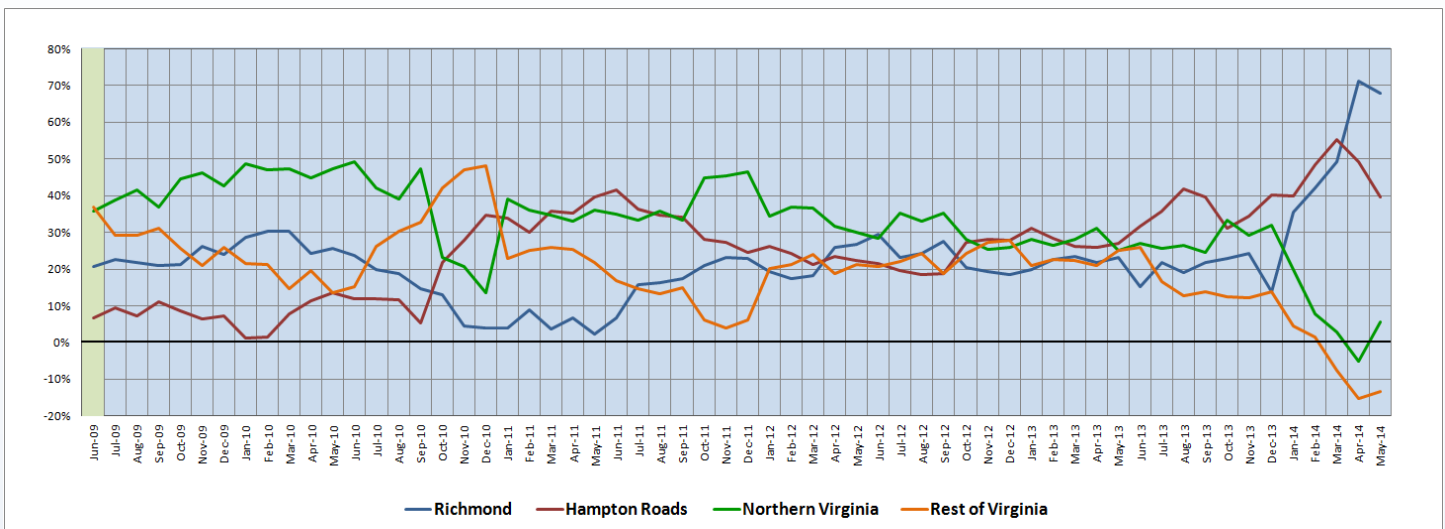
After falling to -0.3% in April, the year-over-year change in Northern Virginia's HC&SA employment growth rebounded into positive territory in May with a year-over-year growth rate of 0.3%. However, the year-over-year HC&SA employment growth rate in the Rest of Virginia remained negative for the third consecutive month. Meanwhile, both Richmond and Hampton Roads, which have been the main drivers of HC&SA employment growth over the previous 12 months, saw their respective year-over-year employment growth rates fall to 4.5% and 2.4% in May. Regardless, HC&SA employment growth in these two regions continue to outperform the rest of their respective economies by a considerable margin.

Figure 2: Year-Over-Year Employment Growth (Not Seasonally Adjusted).



Regional Share of 12-month Growth

Figure 3: Regional Share of Previous 12-Month Employment Growth in Virginia's HC&SA Sector, Not Seasonally Adjusted.



Throughout 2014, there has been a spreading rift between the two regions of the state, Richmond and Hampton Roads, where employment growth has remained strong and the two other regions, Northern Virginia and the Rest of Virginia, where job growth has essentially stalled. This divergence abated somewhat in May, but the gap between the two groups remains considerable. Hampton Roads saw the largest drop in its 12-month HC&SA employment growth share, with a decline from 49.2% in April to 39.6% in May. Richmond also saw a decline in its corresponding growth share to 67.9%, but this still represents a near-record value for the region. Alternatively, Northern Virginia experienced a marked jump in its growth share from -5.1% in April to 5.7% in May, but this remains far below the 25.0% growth share from one year ago.

Subsector Employment Growth

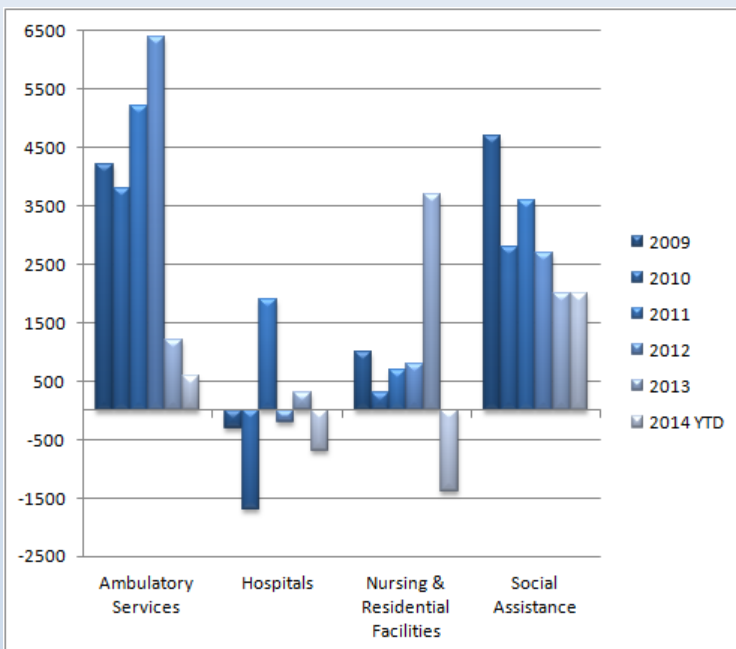


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Dec. to Dec.)

Although Virginia's HC&SA sector had a strong month in May, nearly all of these gains were concentrated in the Social Assistance subsector, which was responsible for an increase of 1,700 jobs during the month. This represents the largest one-month increase for the Social Assistance subsector in more than a decade. The only other HC&SA subsector that added jobs in May was Hospitals, which saw employment increase by 300 jobs, but these gains were erased by the combined loss of 300 jobs in Ambulatory Health Care Services and Nursing & Residential Care Facilities.

A similar trend manifests itself with respect to year-to-date employment gains. So far in 2014, Virginia's HC&SA sector has produced a total of just 500 jobs, and these gains have come entirely from Social Assistance and Ambulatory Health Care Services. In addition, only the Social Assistance subsector has experienced any particular employment strength in 2014, having already matched its full-year employment gains from 2013 in just five months.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	May 2013	Feb. 2014	Apr. 2014	May 2014	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	409.4	411.4	413.0	414.7	1.3%	3.2%	5.1%
<i>Ambulatory Health Care Services</i>	159.1	159.9	160.3	160.1	0.6%	0.5%	-1.5%
<i>Hospitals</i>	109.2	108.8	108.7	109.0	-0.2%	0.7%	3.4%
<i>Nursing & Residential Care Facilities</i>	70.7	72.9	73.0	72.9	3.1%	0.0%	-1.6%
<i>Social Assistance</i>	70.4	69.8	71.0	72.7	3.3%	17.7%	32.8%
Virginia Beach, Norfolk, Newport News							
Health Care & Social Assistance	86.8	89.0	89.1	88.9	2.4%	-0.4%	-2.7%
<i>Hospitals</i>	22.6	23.0	22.8	22.7	0.4%	-5.1%	-5.1%
Northern Virginia							
Health Care & Social Assistance	114.2	113.8	113.7	114.5	0.3%	2.5%	8.8%
<i>Ambulatory Health Care Services</i>	52.1	53.0	52.8	52.7	1.2%	-2.2%	-2.2%
<i>Hospitals</i>	25.0	24.0	24.1	24.3	-2.8%	5.1%	10.4%

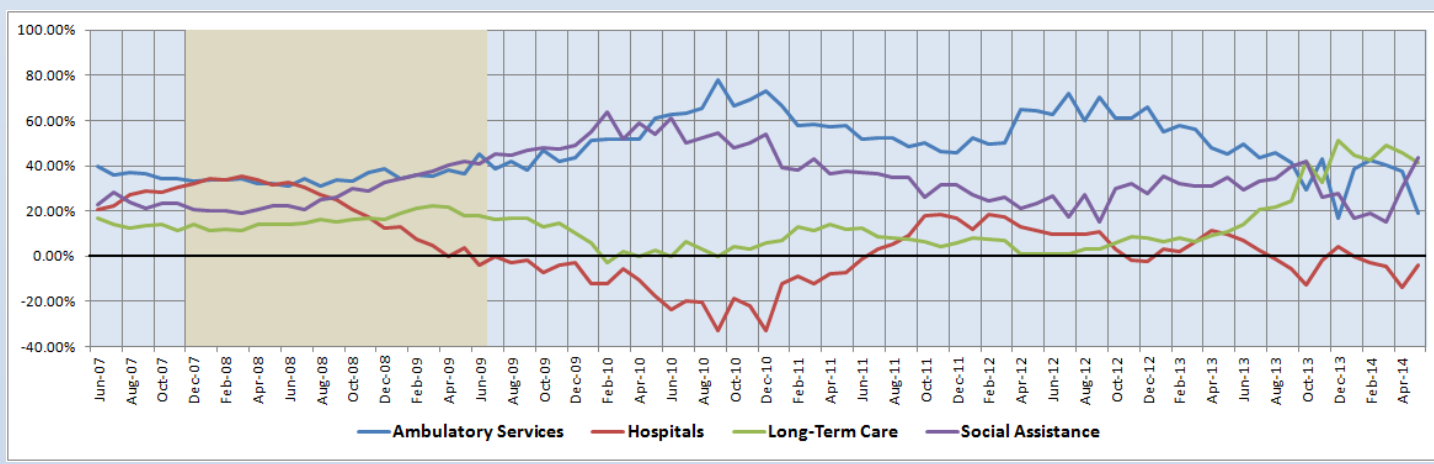
Preliminary estimates are italicized

Thanks to its strong employment gains in May, Social Assistance now sports the highest 12-month employment growth rate of all HC&SA subsectors in Virginia, although employment in Nursing & Residential Care Facilities is still growing at a relatively strong 3.1% annual rate. However, Nursing & Residential Care Facilities has seen no employment growth over the past three months, while Social Assistance currently has a three-month annualized growth rate of nearly 18%. Meanwhile, the Hospitals subsector continues to experience very anemic long-term employment growth. Indeed, 12-month employment growth in Hospitals has now remained negative for four consecutive months.

Share of 12-Month Growth by Subsector

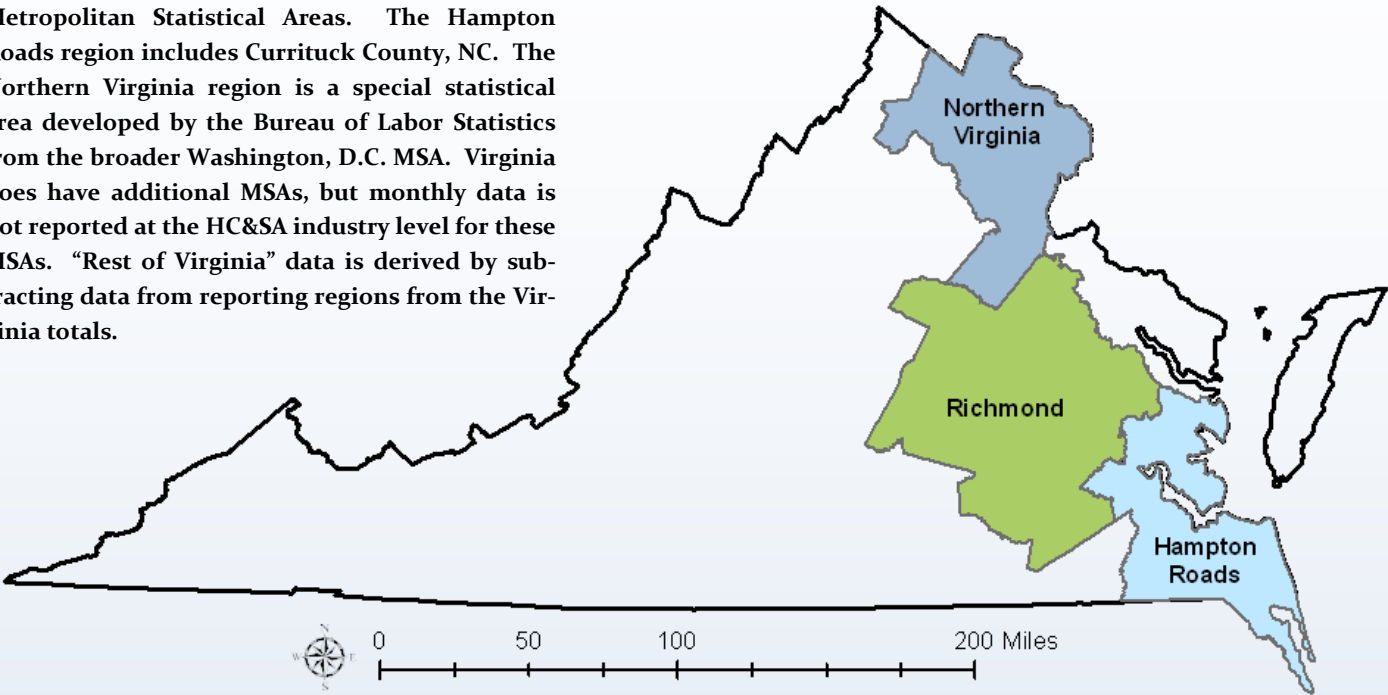
Since January, Social Assistance has been the only HC&SA subsector in Virginia that has increased its share of 12-month employment growth, and essentially all of this growth has come in just the past two months. This growth has come mainly at the expense of the Ambulatory Health Care Services subsector, which has seen its 12-month employment growth share decline from 38.9% in January to 18.9% in May. Meanwhile, there are still no indications of a rebound in the lackluster employment growth of the Hospitals subsector. Not only have Hospitals had the lowest 12-month employment growth share of all subsectors since last May, but the subsector has also not even had a positive growth share since last December.

Figure 5: Share of Previous 12-Month Growth in Virginia's HC&SA Subsectors (Not Seasonally Adjusted).



Region Map

HWDC *Briefing Series 2* uses Federally designated Metropolitan Statistical Areas. The Hampton Roads region includes Currituck County, NC. The Northern Virginia region is a special statistical area developed by the Bureau of Labor Statistics from the broader Washington, D.C. MSA. Virginia does have additional MSAs, but monthly data is not reported at the HC&SA industry level for these MSAs. “Rest of Virginia” data is derived by subtracting data from reporting regions from the Virginia totals.



Region Detail

Northern Virginia		Richmond		Hampton Roads	
Northern VA, (Non-standard CES Area 94783)		Richmond, VA (MSA 40060)		Virginia Beach-Norfolk-Newport News, VA-NC (MSA 47260)	
Counties:	Cities	Counties:	Cities	Counties:	Cities
Arlington	Alexandria	Amelia	Colonial Heights	Gloucester	Chesapeake
Clarke	Fairfax	Caroline	Hopewell	Isle of Wight	Hampton
Fairfax	Falls Church	Charles City	Petersburg	James City	Newport News
Fauquier	Fredericksburg	Chesterfield	Richmond	Mathews	Norfolk
Loudoun	Manassas	Cumberland		Surry	Poquoson
Prince William	Manassas Park	Dinwiddie		York	Portsmouth
Spotsylvania		Goochland			Suffolk
Stafford		Hanover			Virginia Beach
Warren		Henrico			Williamsburg
		King & Queen		Currituck, NC	
		King William			
		Louisa			
		New Kent			
		Powhatan			
		Prince George			
		Sussex			

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About the Data

Data in this report is from the US Department of Labor Bureau of Labor Statistics' Current Employment Statistics program. The CES program surveys about 140,000 businesses and government agencies monthly. Unless otherwise noted, this series uses data that is not seasonally adjusted. Seasonal variations related to weather, holidays, weekends, seasons and other predictable variations are apparent in the data. Short-term changes may be related to seasonal changes rather than underlying trends. Data from recent months is preliminary and subject to revision in future releases from the CES. Revisions will be reported in future editions of this series. Unless otherwise noted, the CES data presented in this series:

Includes:

- ◆ Data on employed individuals drawing a paycheck (payroll employees).
- ◆ All employees, regardless of role, occupation or hours worked.
- ◆ HC&SA employees in the private sector only.
- ◆ Persons employed by health professionals in private practice.
- ◆ Both government and private sector workers in nonfarm employment data.

Does not include:

- ◆ Self-employed workers or volunteers, including health professionals in private practice.
- ◆ HC&SA employees in the public sector. (These are counted as government workers in monthly reports. Approximately 54,500 of Virginia's public sector workers worked in the HC&SA sector in 2010 at the federal, state and local levels).
- ◆ Information on hours worked or the quality of employment.
- ◆ Government workers in HC&SA level data. (Government workers, regardless of occupation and role, are classified as public sector employees).